

## Fundamentals Course Homework

### Session 3

#### Part A

In this session, we've touched on the idea of the necessity of reports and presentations for a BR&E program using a volunteer visitor methodology with a "blitz" approach.

For this session, I'd like for you to think about the benefits (and perhaps challenges) in preparing reports and presentations for the BR&E visitation program that you are envisioning in your REN. Please think about the following questions:

- To whom or what groups would the reports/presentations be delivered?
- How would this benefit the strength of the REN BR&E program?
- What would be included in the report given that the collection of data in a continuous model is likely to be relatively slow?
- How would you turn data into information for the audience(s)?

#### Part B

The following Excel file (Open Ended Survey Homework.xlsx) contains a number of responses from a COVID-19 business retention and expansion survey conducted in Mississippi. What topics would you use to categorize these responses?

Due by the beginning of the October 1, 2020 session.

### Response 1

#### Part A

- **To whom or what groups would the reports/presentations be delivered?**

The primary audience for these reports would be elected officials and other decision-makers in community leadership positions. They are the people in the best position to take the findings of the BR&E visitation program and turn them into actions necessary to address the needs of our businesses.

- **How would this benefit the strength of the BR&E program?**

Much as above, the elected officials and decision-makers in the community have the authority, ability, and power and responsibility of position to take actions that will address the business needs. It will also validate the process and ascribe credibility in that the BR&E results are being listened to and acted upon the leadership of our community.

- What would be included in the report given that the collection of data in a continuous model is likely to be relatively slow?

The red and green flag items discovered during the visit-interview process would have been of such high priority and time sensitivity that action should have taken place addressing them before the report was compiled and ready for public presentation.

The actions taken on these should be among the first topics presented after the introduction and explanation of the process. Bringing results from the BR&E to the forefront of the presentation to community leadership shows this is a plan of proven action and results, not an exercise in just gathering lots of information and talking about it.

- How would you turn data into information for the audience(s)?

I would prioritize the information I want the audience to focus and act upon while utilizing graphics rather than just words to tell that story. I would also focus on the significant findings at the meeting rather than trying to cover every item included on the surveys.

The information not presented will be available for the audience to read if they choose, but won't be covered in this presentation. The targeted audiences of elected officials and community leaders have neither time nor appetite for long presentations that drone on while the presenter takes this opportunity to tell them about every data point discovered during the BR&E process.

#### ***Part B***

- Funding for Business Expansion
- Financial Assistance for Ongoing Operations
- COVID-19 (lack of consistent communication, financial impacts, lack of governmental leadership and trustworthiness, PPE shortages)
- Supply Chain
- Internet (quality of signal, ability to navigate and find resources)
- Economic Incentives
- Workforce
- No Support Suggestions
- Shop Local
- Government Overreach (closing businesses, mask requirements, enhanced unemployment money hurting hiring)

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## **Response 2**

### ***Part A***

#### **To whom or what groups would the reports/presentations be delivered?**

Several groups could benefit from this type of information, including elected officials at the City or County levels, the businesses being targeted by the BRE program, and potential volunteers of the BRE program.

#### **How would this benefit the strength of the BR&E program?**

The primary reason to report on BRE activities is to show impact and provide program justification to the various groups we are reporting to. If elected officials are helping to fund the program, they want to understand its value before they provide more funding. If businesses are participating, they want to understand their return on investment before they continue meeting with the task force. If the program uses volunteers, they want to understand the impact they are having to continue helping.

#### **What would be included in the report given that the collection of data in a continuous model is likely to be relatively slow?**

The type of data provided would heavily depend on the frequency of the report. For quarterly reports, I suspect the information would have to be limited to progress reports. How many businesses were toured? How many red flags were identified? For annual reports, aggregate data could be analyzed and compared year after year. Are businesses growing or shrinking? Is access to capital getting better or worse? Lastly, there could be a need for occasional special reports that detail how specific businesses were helped.

#### **How would you turn data into information for the audience(s)?**

When possible, I try to turn the data into visual charts and graphs. When comparing subsets of data, using pie charts helps the reader understand how the pieces compare to the whole. When comparing time series data, bar or line charts help show trends over time. When showing non-binary data, scatterplots can show variance in answers and can bring attention to outliers.

### ***Part B***

Based on the responses, I would organize these answers into one of the following categories:

- No Support Needed
- Increased Leadership and Communication
- Consistent Guidance / Best Practices
- Additional Assistance for Businesses
- Additional Assistance for Residents
- Fewer Unemployment Benefits
- More Healthcare / Self Help Programs
- Increased Internet Capacity
- Business Marketing Assistance
- Less Government Intervention
- Not Sure

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### **Response 3**

#### **Part A**

1. To whom or what groups would the reports/presentations be delivered?
  - Local government (City Council, Commissioners Court, etc.)
  - Economic Development Partners (Chamber of Commerce, SBDC, Economic Development Foundation, etc.)
  - Workforce Education Partners (School district, community college, technical college, etc.)
  - Civic organizations (Rotary, Lions, etc.)
  - State & federal legislators
2. How would this benefit the strength of the BR&E program?
  - Those businesses participating are often involved in these groups and they can see the benefit of how the information is tabulated in a confidential manner that still informs decisions being made in the community that should positively impact their business. Hopefully, it will encourage their buy-in for future BR&E visits.
  - Other entities that make decisions for the future of the community can tap in to the information to plan for future programs that will benefit the economic growth in the community.
3. What would be included in the report given that the collection of data in a continuous model is likely to be relatively slow?
  - I would like to develop a template presentation that I can add/revise the information into on a quarterly basis so that it becomes familiar as and a particular group sees the presentation over time they know how to focus on the portions of the presentation that most impact their core business.
  - I would focus on trends—movement upward/downward over time, increases/decreases in frequency of common responses, etc. rather than raw numbers as the raw numbers early in the program will be insignificant, while the trends can still be informative.
4. How would you turn data into information for the audience?
  - Again, focusing on trends makes the raw data more understandable and relevant to the users.
  - Charts and graphs—visual images are impactful
  - Coalescing information that cannot be represented graphically into a table and grouping like responses
  - I wish I had used the categorizing idea for the COVID survey we did locally—that will be very helpful going forward!

#### **Part B**

What business supports do you think would be beneficial as we navigate this global challenge?

1. Funding
2. Nothing needed
3. Better communication/information
4. Unknown
5. Support other than funding
6. Remove/reduce government interference
7. Tighter/continued health safety measures
8. Increased government assistance

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## Response 4

### Part A

- To whom or what groups would the reports/presentations be delivered?
  - *Businesses that were visited/interviewed*
  - *Response Team – stakeholders/partners/service providers*
  - *EDO Board of Directors*
  - *City Council*
  - *Companies looking to invest*
  - *Regional associations*
  - *State entities*
- How would this benefit the strength of the BR&E program?
  - *Knowing that the information collected was being used for a purpose of continuing growth and way to facilitate/make improvements. Identify trends and address challenges/issues, develop innovative solutions. Identify training that can be offered (via educational institution) to meet workforce/employer needs.*
- What would be included in the report given that the collection of data in a continuous model is likely to be relatively slow?
  - *Executive Summary (note period of time)*
  - *Fact Sheets – based on data collected*
  - *Charts of responses, trends*
  - *List of businesses visited*
  - *Actions taken (or planned) in response to visits*
- How would you turn data into information for the audience(s)?
  - *Graphics/charts/photos (where/when appropriate)*
  - *Listing of challenges addressed, and chart of trends in issues*
  - *Fact Sheets*

### Part B

Topics for Covid/Pandemic Needs:

- *PPE and Safety Guidelines*
- *Communication*
- *Customer Service/ Sales/Marketing*
- *Grants/Funding/Resources*
- *Broadband/Internet Needs/Online Sales*
- *Workforce/Employees*
- *Supply Chain*
- *Leadership/Political*
- *None/Unsure*

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## **Response 5**

### **Part A**

Preparing and presenting meaningful reports is important for the community to move forward with economic development. The challenge is collecting and interpreting the most relevant data.

Crosstabulation can be beneficial as it does a deeper dive into the data, however as discussed in class, it can go too far and get into an unnecessary level of detail that cannot be properly understood or interpreted. Once the most relevant data sets have been determined and collected, it would be best to have professionals interpret it and turn it into information that can be presented. In my region, we have many universities who would have students that could work on this; however, our organization also has an economic research team that specializes in this type of work. Therefore, I would work with our research team to assist with coming up with the most appropriate questions to ask and then have them work on the interpretation of the data to create a presentation of the information. Once this information is in presentation format, it would be important to present this to key stakeholders in the community including action team members. This may also include the local chamber of commerce, industry associations, government (all levels), leaders from the business community etc. with a focus on confidentiality. Having strong, meaningful data that can be shared within these groups should strengthen the BR&E program by providing insight to different types of organizations about the current state and the business community perspectives on how they are managing and outlook for the future. It goes back to the collaborative approach where the community is working together toward a common goal. It is important to focus on some common trends found in the data, as well as some of the outlier challenges/opportunities that could potentially signal other more pressing issues. The information must be relevant to the community and the sectors/industries associated with the area.

### **Part B**

Topics that I am seeing from the spreadsheet are as follows and highlighted in column K:

- Financial
- Safety – including access to PPE, signage
- Communication – including COVID communication, signage, marketing, training
- Economy
- Infrastructure – especially around IT
- Supply Chain
- Workforce

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## **Response 6**

### **Part A**

There are a number of groups that I could envision sharing reports and doing presentations for. The primary group would likely be our municipal council to keep them updated on our efforts with the BR&E program, and keep them informed of how local businesses are functioning. As this is a relatively small and rural area, the local Councillors like to keep informed about the local businesses, not only because they play an important role in our community but also because the business owners and employers are often local residents/constituents. Prior to sharing this information with Council, I would see it as being a good opportunity to also share this information with our BR&E local action team that meets monthly to discuss local business matters, including client issues that get brought to our attention (even outside of the formal BR&E program).

Council meetings are also public, so any information in the form of a report or presentation would be available for the public to access (unless otherwise noted as confidential). Sharing reports and doing presentations would provide further legitimacy to the program by making information available and drawing attention to the existence of this program, and the fact that something is actually being done with the information collected. I think businesses would appreciate knowing that reports and presentations are happening based on the visits that are taking place.

Aggregate data would be included in the report/presentation, so that it can always be updated in the continuous model. For this reason, you should have the sample size available i.e this data is based on the XX amount of businesses that have participated to date in our BR&E program. Aggregating the data will also help to avoid any issues with confidentiality as you are presenting on what you are seeing as a whole for the BR&E Program. This information should be turned into easy to understand statistics for a report. I'd want this data to be able to tell a story about the local business community and provide the necessary insights into what we learned or are learning through our BR&E program. For a presentation I'd want to report it in a visually appealing way, such as using graphs, tables, or other graphics.

### **Part B**

A few topics I would use to categorize these responses include:

- Communications (accurate information sharing)
- Government Intervention/Public Health Directives
- Financing and Funding/Grant Support
- Support/Buy Local Campaign & Marketing
- Internet
- Workforce Assistance
- Support Services (helping businesses get online, accessing programs, etc.)
- Supply Chain Assistance
- Required Renovations (to protect employees, customers, or to adapt business)
- Personal Protective Equipment Purchasing.

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## **Response 7**

### **Part A**

The reports from the BRE visits in our area could be presented to our city council, county commissioners, EDC Board, chamber and maybe school board.

I think a biggest challenge would be the human interaction – it's not a number that can be added to an algorithm. The reports can help the city/county realize where they are coming up short-workforce, wages, transportation, etc. The outreach and support will continue to bring the community together and create partnerships. Communication is key after the visits to help the company with their flags. Making sure each team know what their function is also very important.

The report given will have the information acquired during the visit including any flags that may have come up: workforce, affordable living, average salary, any plans for expansion. If possible, we would try to turn the data into an infographic to make it relatable to everyone.

### **Part B:**

Covid/Health and safety

Communication

Finance

Economy

Employment

Customer Service

Uncertainty/Fear

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## **Response 8**

### **Part A:**

- To whom or what groups would the reports/presentations be delivered?
  - In Durant, reports and/ or presentations (aggregate data) will be delivered to the Durant Industrial Authority, City of Durant, Durant Area Chamber of Commerce, Durant Economic Development Council, Durant Main Street board members, etc.
- How would this benefit the strength of the BRE program?
  - Presentations will benefit our BRE program by demonstrating the use of the information collected. Business representatives are very busy and must prioritize the use of their time. If they know the data is being used, they will be more inclined to participate.
- What would be included in the report given that the collection of data in a continuous model is likely to be relatively slow?
  - Aggregate data will be shared, as well as common themes across all interviews. For example, in Durant, after speaking with several plant managers, I learned that the addition of the new bypass has been causing transportation issues for local companies.

After the addition of the bypass, Durant had four separate stretches of roads that were all named some form of Highway 70. This caused two of our local plants to have almost identical addresses, and was causing trucks to go to the wrong place for delivery. We used the data to support name changing for the affected roads.

- How would you turn data into information for the audience(s)?
  - Durant conducted online BRE surveys during the early weeks of the pandemic. We asked several questions related to operations, most specifically whether they were running at full capacity, had layoffs, etc. The participants selected a range or percent for each question. We were able to turn the aggregate data into a report stating, “43% of companies surveyed are currently operating at 50% or more of the pre-Covid numbers”.

#### **Part B:**

Funding

Advocacy

Supplies (PPE)

Access to Information (communication)

Other resources.

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#### **Response 9**

##### **Part A**

There are multiple ways to gather information, including the local volunteer blitz approach, individual visits using the Director, a third-party organization, and emailed surveys. Each method has qualities that would garner the most accurate information depending on the specific industry or business. The primary goal regarding any collection of information is to turn those results into reports to implement or use the data.

The blitz approach for gathering information in our community would be most successful in the retail industry. Many of these businesses are accustomed to having their day interrupted and are familiar with talking to volunteers. Retailers have previously used data gathered from surveys.

Individual visits from the Director would be most effective with industrial partners who are very protective of their information and will not share the information with an unfamiliar person. A third-party organization would require an introduction. In our area this would occur in a group meeting with followups by the third-party. Email surveys will only work if they are also considered a followup to an initial meeting. We are in a rural area with a small group of industries. The focus of the survey should be on how the industries can use that information.

The industrial reports would include:

- Wage Surveys – Welders typically change jobs frequently for very little pay difference. If industries knew the average pay scale in our area, they could initiate employee retention practices.
- Housing statistics – This would help to answer the problem of a small employment pool. Workers need homes for jobs, and they need jobs to afford homes. What is the disparity between the two factors, and can they be bridged?
- Available Workforce – The available workforce would show the unemployment by income level if possible. These figures would provide the basis of

This information should be presented in a report delivered to each of the industries. The report should have several graphics and links to more in depth information.

**Part B**

- New renovation requirements
- Funding and/or grants
- Official communications
- Local promotions
- Standardized restrictions
- Additional unemployment
- Supply lines/chains
- Recovered or no effect

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**Response 10**